FEES AND TUITION REQUEST FORM – CHEAT SHEET

DocuSign | Pitt

REQUESTER Step 1 – Setup:

https://my.pitt.edu	DocuSign	Manage	Create > Envelope
My Pitt	DocuSign – Send, sign, and manage documents electronically.	Manage	Create / Envelope
Choose an Online Document	**Shared Templates**	**Fees and Tuition Request Form**	**Add**
Choose an Online Document	Shared Templates	Fees and Tuition Request Form	Add

Step 2 – Attachments: e.g., Provost's approval. You can also attach extra pages for Course Fee Data or Tuition and Other Fee Data if needed (the form includes 16 lines for Course Fee Data and 5 lines for Tuition and Other Fee Data).

Browse from My Computer	or Choose an Online Document (e.g., for a Box document)	Add
Browse from my Computer	Choose an Online Document	Add

Step 3 – Recipients: 1. **Requester** – fill in your name and email. 2. **Dean, Director or Campus President** - fill in recipient name and email. 3. **Senior Officer** – fill in recipient name and email, ***Health Sciences only***. **All other areas should click the "x" button to remove this signer**. Do not edit **Provost, Student Financial Services**, or **Registrar**.

Step 4 – Email Message and Envelope Settings: Put a description of the form in the subject line and customize the Email Message as desired. **Do not remove the New Item Type or DocuSign Help URLs from the body of the email**. Do not edit the **Envelope Settings** section.

Step 5 – Sending the Form: Double check that all attachments have been included. Attachments cannot be added after exiting this screen.

Next	Send	Send Anyway > Yes	Fill in highlighted fields > Finish
Next	Send	Send Anyway / Yes	FINISH

To view the form's progress, go to **DocuSign > Manage > Search Folders > Out for Signature > Summary**. You will receive an email notification when each role completes the form, and a final email with the completed document attached. If you need to cancel the form, open the form and go to **Other Actions > Void**.

DEAN, DIRECTOR or CAMPUS PRESIDENT / SENIOR OFFICER (Health Sciences only) / PROVOST: You will receive an email stating that you have been sent a document to review and sign. Click the **Review Documents** link in the email, and click in the highlighted field on the form to sign. Click **Finish** to finalize your changes and route the document to the next recipient.

STUDENT FINANCIAL SERVICES: You will receive an email stating that you have been sent a document to review and sign. Click the **Review Documents** link in the email, and determine if the **Registrar** needs to receive a copy.

Registrar Copy Needed: If the Requester did not fill **Item Type 1** and/or **2** above, complete the **Item Type 1** and/or **2** fields under **Approvals > Student Financial Services**. Click the **Approve** button on the form to route the document to the Registrar.

No Registrar Copy Needed: Click **Other Actions > Correct** from the top navigation bar. From the **Recipients and Routing** section, **remove the Registrar role** by clicking the "x" button on that line. Click **Correct** at the bottom of the page. You will be returned to your DocuSign Inbox. Go to **Search Folders** > **Awaiting My Signature** and double-click the document to open it. If the Requester did not fill **Item Type 1** and/or **2** above, complete the **Item Type 1** and/or **2** fields under **Approvals > Student Financial Services** Click the **Approve** button.

REGISTRAR: If Student Financial Services has determined that the Registrar needs to receive the document, you will receive an email stating that they sent you a document to review and sign after they have completed their portion. Click the **Review Documents** link in the email and add any optional commentary in the **Registrar Review-Optional section** (up to 510 characters), then click the **Approve button. Clicking the Approve button closes and completes the document and you will not be able to make any further edits. You must click APPROVE to complete the document.**

ALL RECIPIENTS WILL RECEIVE A FINAL EMAIL WITH THE COMPLETED DOCUMENT ATTACHED.
DOUBLE-CHECK THE COMPLETED DOCUMENT FOR ANY COMMENTS OR CHANGES.
DocuSign Support: https://support.docusign.com (DocuSign > Home > Need Help?)
"Other Actions" Guide: https://support.docusign.com/en/guides/cdse-user-guide-signing-sign-other-actions-new